Performance and Contract Management System
Data Submission Guide

This guide is a review of how to submit data into the Performance and Contract Management System (PCMS).

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Logging in

To log into the PCMS, open your Internet browser (e.g., Explorer) and go to: **https://www.ccsiconnect.org**

1. Enter your User Name and Password (case-sensitive) in the boxes on the screen.

2. Click on the **Login** button or press **Enter** to log in.

Click here to log in

Enter your User Name and Password here (case-sensitive)

3. The main menu will appear with the following headings:
   a. *Performance Reporting* - Contains your agency's contract deliverables. The deliverables include:
      i. initial administrative deliverables on agency and specific program levels
      ii. data collection forms for baselines and targets
      iii. data collection forms for quarterly reporting throughout the contract year
   b. *Documents* - Files available for viewing or downloads (see page 12). Some examples of resources you will find there:
      i. definitions of performance measures
      ii. blank forms to be completed and submitted in PCMS
      iii. a copy of this user guide

Performance Reporting - Accessing Contract Deliverables

1. Click on **Select Agency and Deliverables** under the Performance Reporting heading.

Click on this hyperlink

You will see the screen containing all deliverables and agency documents.

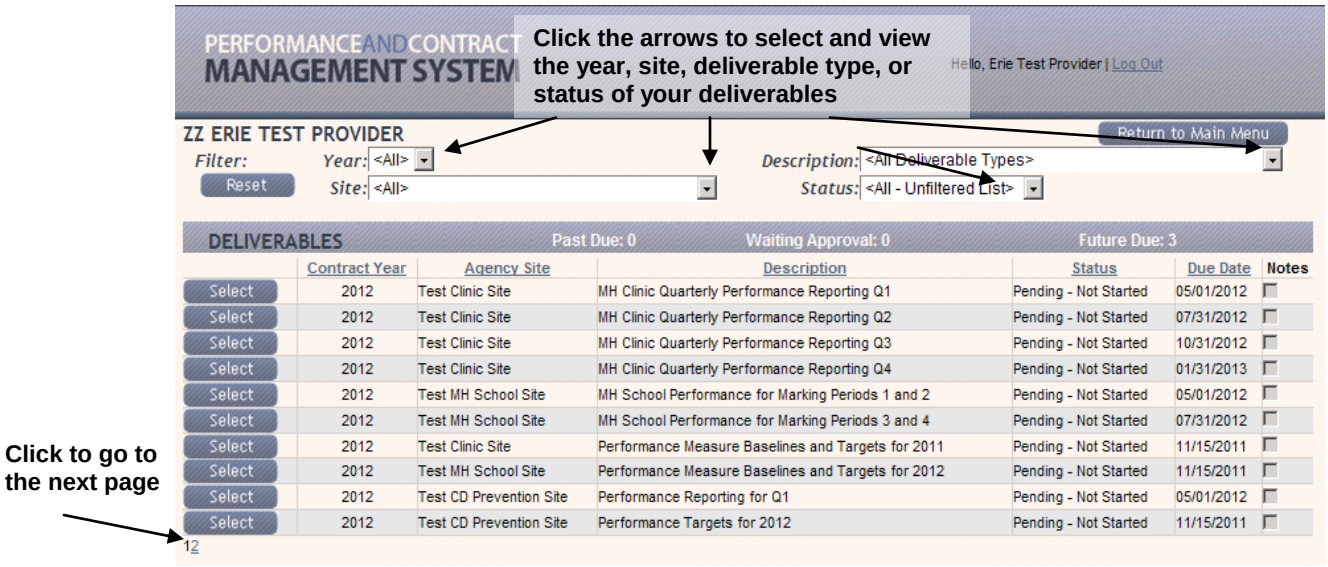
2. Click the arrows on the drop-down boxes to create a custom view of your deliverables.

   a. You can filter by year, program-site, deliverable type, or deliverable status.

   b. If there is more than one page of deliverables, click at the bottom left to go the next page.

   c. If you want to view all deliverables for your agency, or if you want to create a different filtered view of your agency's deliverables, click the **Reset** button to clear the current view.

d. Clicking on underlined column headings will sort the displayed deliverable list in ascending or descending order.

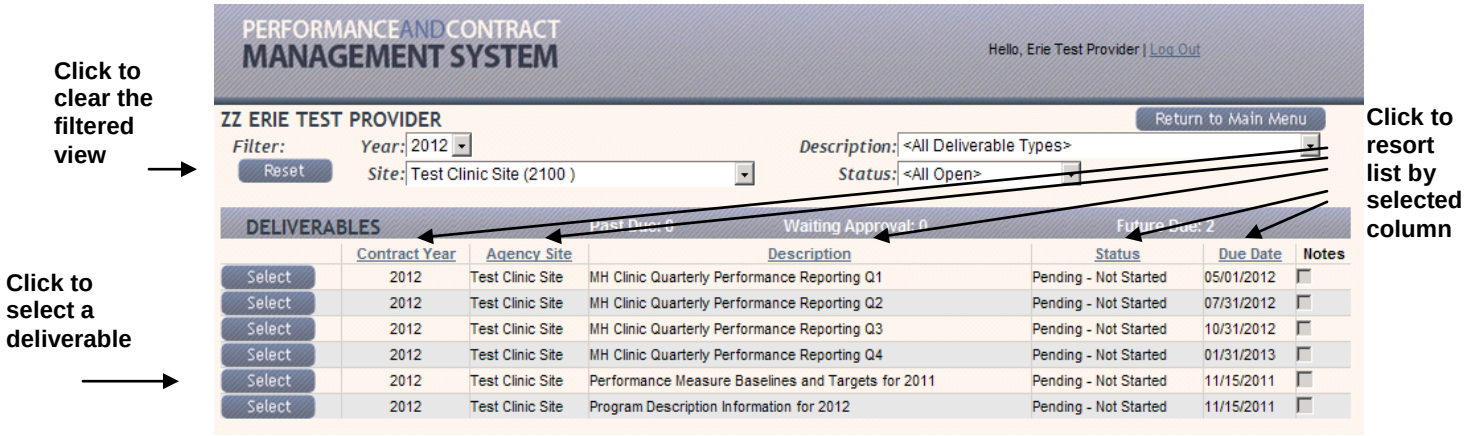


e. In the screenshot below, the following have been selected to create a filtered view of the agency deliverables:

Year: *2012*

Site: *Test Clinic Site (2100)*

Status: *All Open*



Deliverable Data Collection Forms

1. Click the Select button next to the deliverable you wish to submit.

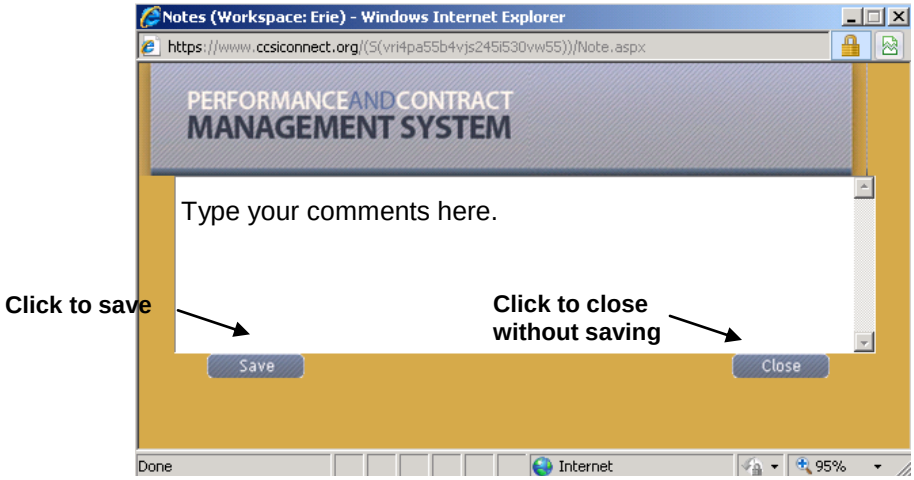
2. The data collection form will appear with a deliverable summary at the top of the screen.

3. If appropriate, files to support your data entry information can be uploaded in the File Upload section. **See page 12 for instructions on uploading files**.

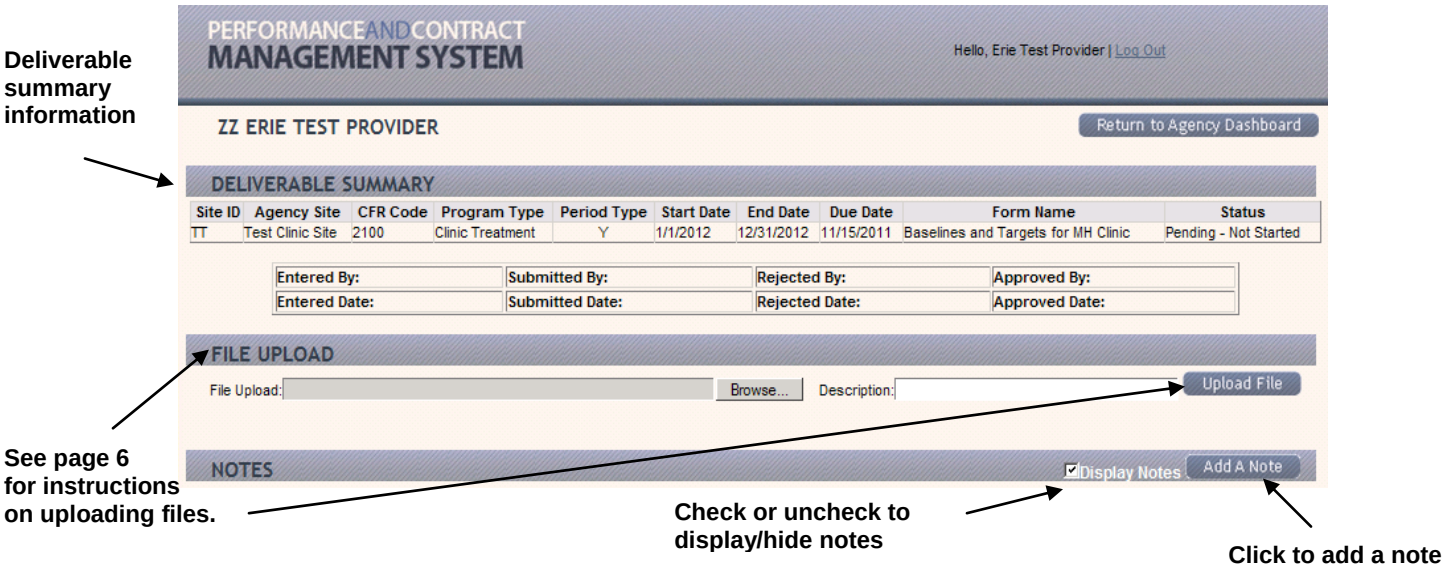
4. To add a note, click on **Add a Note**

    a. Enter your comments.

    b. Click Save to submit the note or Close to cancel.

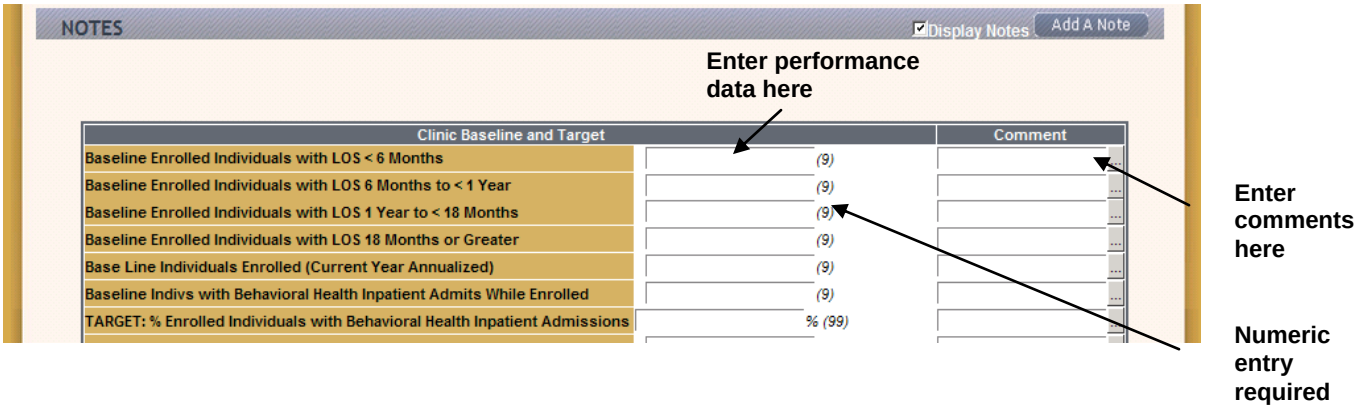


5. Click the **Display Notes** box to display notes or click to uncheck the box and hide the notes.

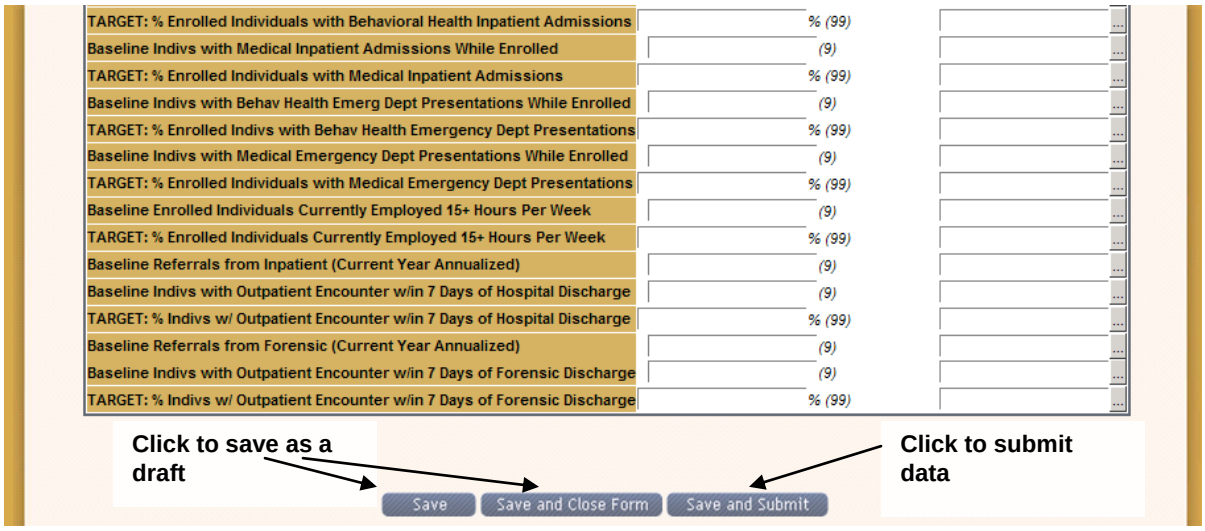


Entering Performance Measures in Data Collection Forms

1. The data collection form for your agency's program can be found below the **Notes** section.
2. Enter performance data where indicated.
3. Fields marked ***(9)*** require numeric entries.
4. Comments or questions for any performance measure can be entered in the **Comments** section.

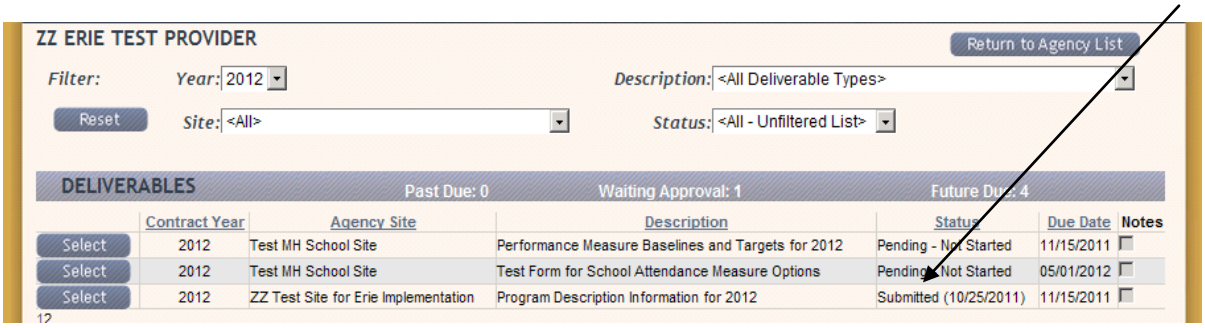


5. When you have finished entering your data, click **Compute Total** if you wish to see totals calculated for the data you have entered. Note: This will only be applicable when reporting measures by subgroup (e.g. race categories).
6. Click on **Save** or **Save and Close Form** to save data without submitting it to Erie County Department of Mental Health; or click on **Save and Submit** to submit data to the county.

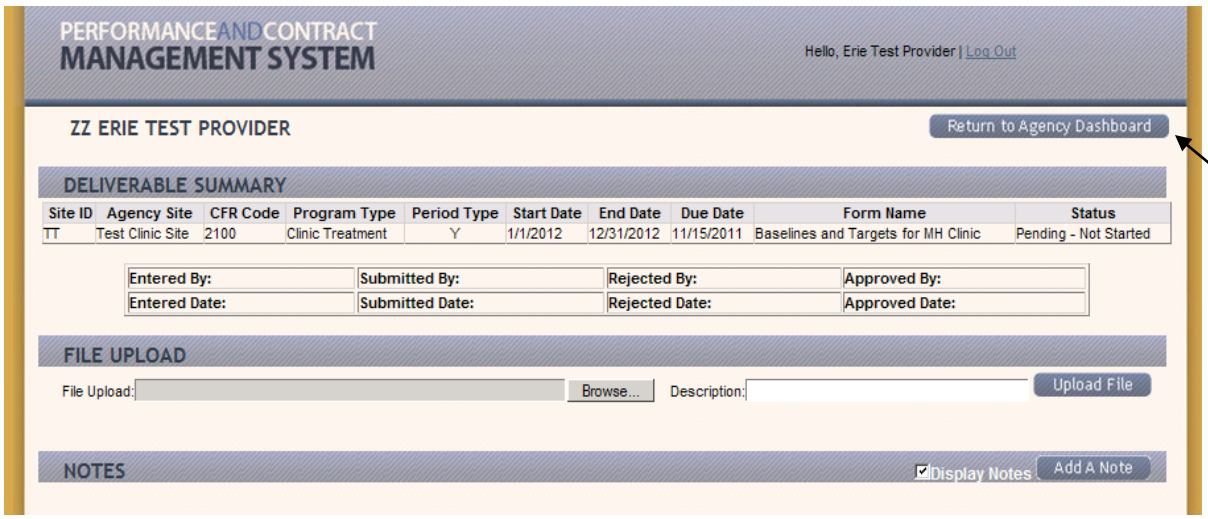


7. Print your data submission using the **Print** command in your Internet browser.

8. Once you have submitted data, the deliverables listing will show the status of the deliverable as "Submitted".



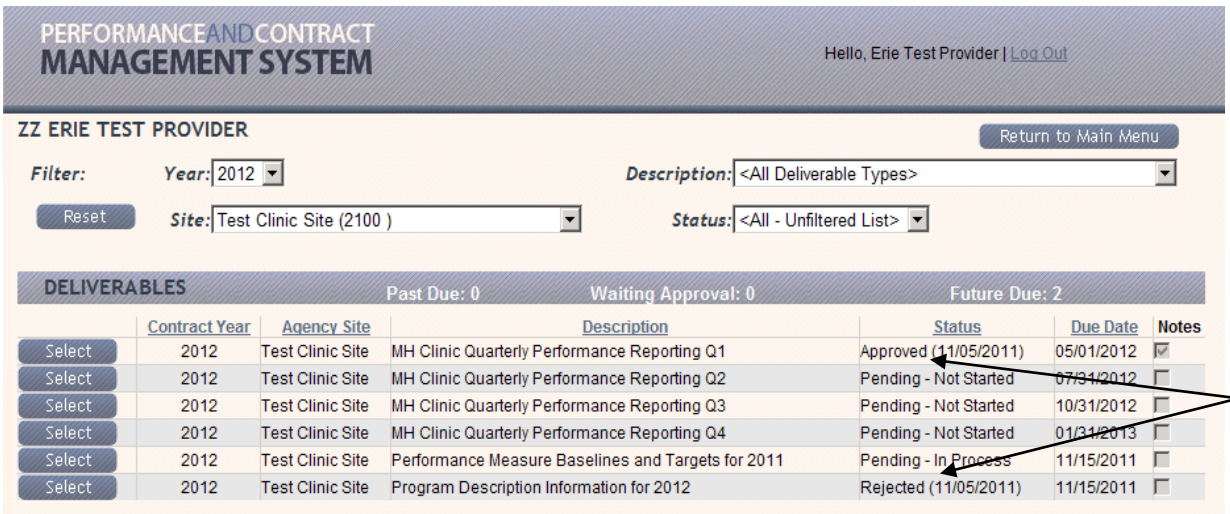
9. To enter deliverables for another program site, click on **Return to Agency Dashboard** and choose another program site.



Click to return to the dashboard and enter data for another site

10. After data is submitted, staff at Erie County Department of Mental Health will review the information and either approve or reject it. If there are problems with your submission, you will be contacted by the staff member via phone or email. Staff members may add notes to your deliverable to provide you with the detail necessary to correct your submission.

11. The status of your deliverables is always displayed in the deliverables list.



Current status of the deliverable is always displayed.

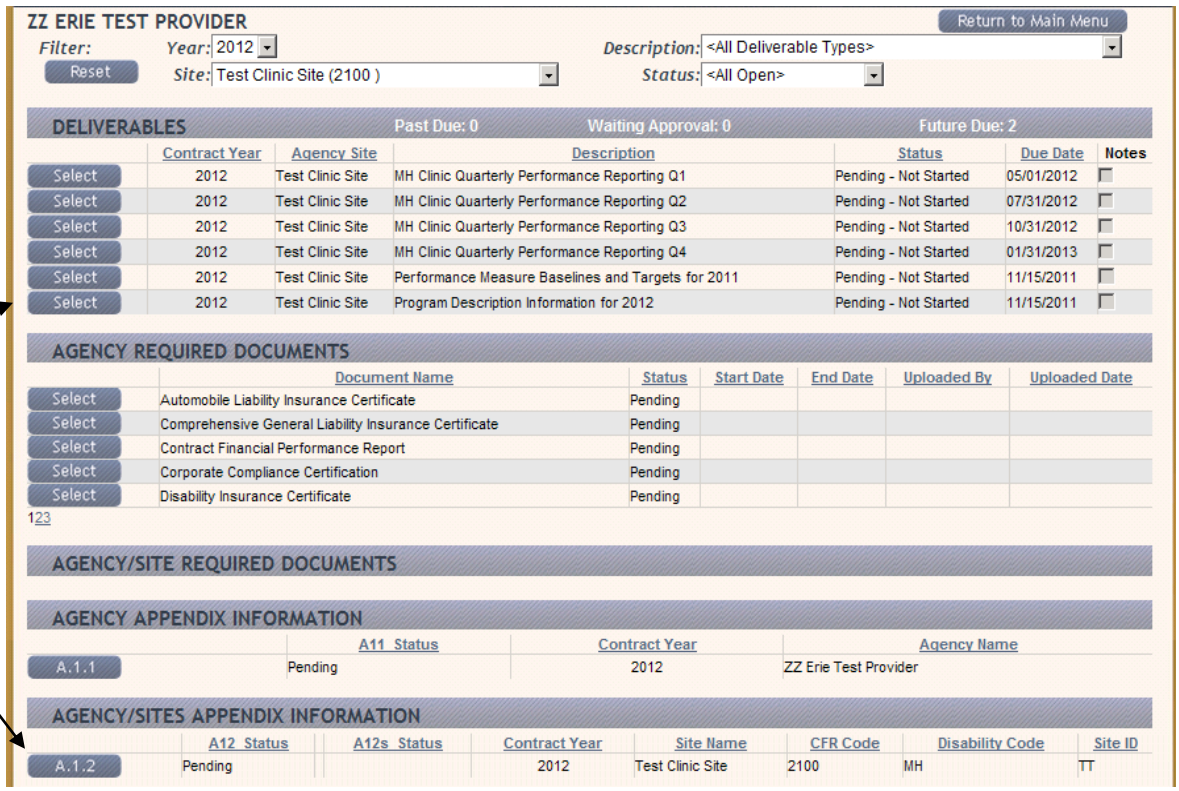
12. If you correct data and submit again, the status of the deliverable will change to "Submitted" so that Erie County staff will know that you have made adjustments to your original submission.

Submitting Data for Program Description Information (A.1.2)

1. There are two ways to access the form for entering program description information:

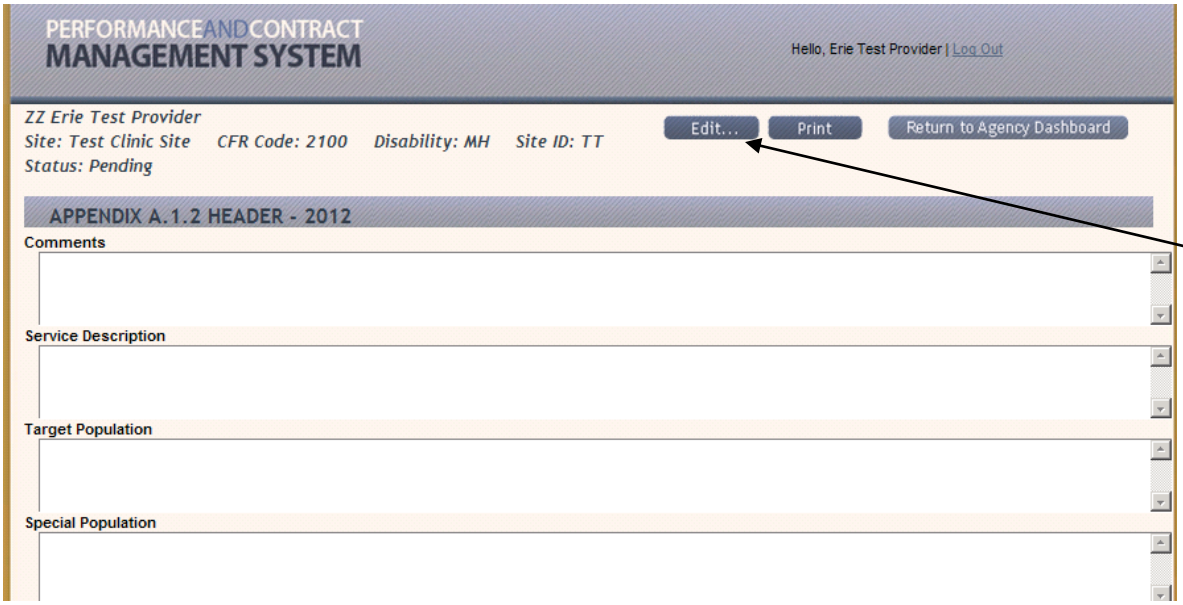
    a. Click on the deliverable (in this example **Program Description Information for 2012**).

    b. Click on the **A.1.2** button in the **Agency/Sites Appendix Information** section.



Clicking either button will open form for program description information.

2. When the form is first opened, it will be in “view only” mode. Click on the **Edit** button to input and save data.



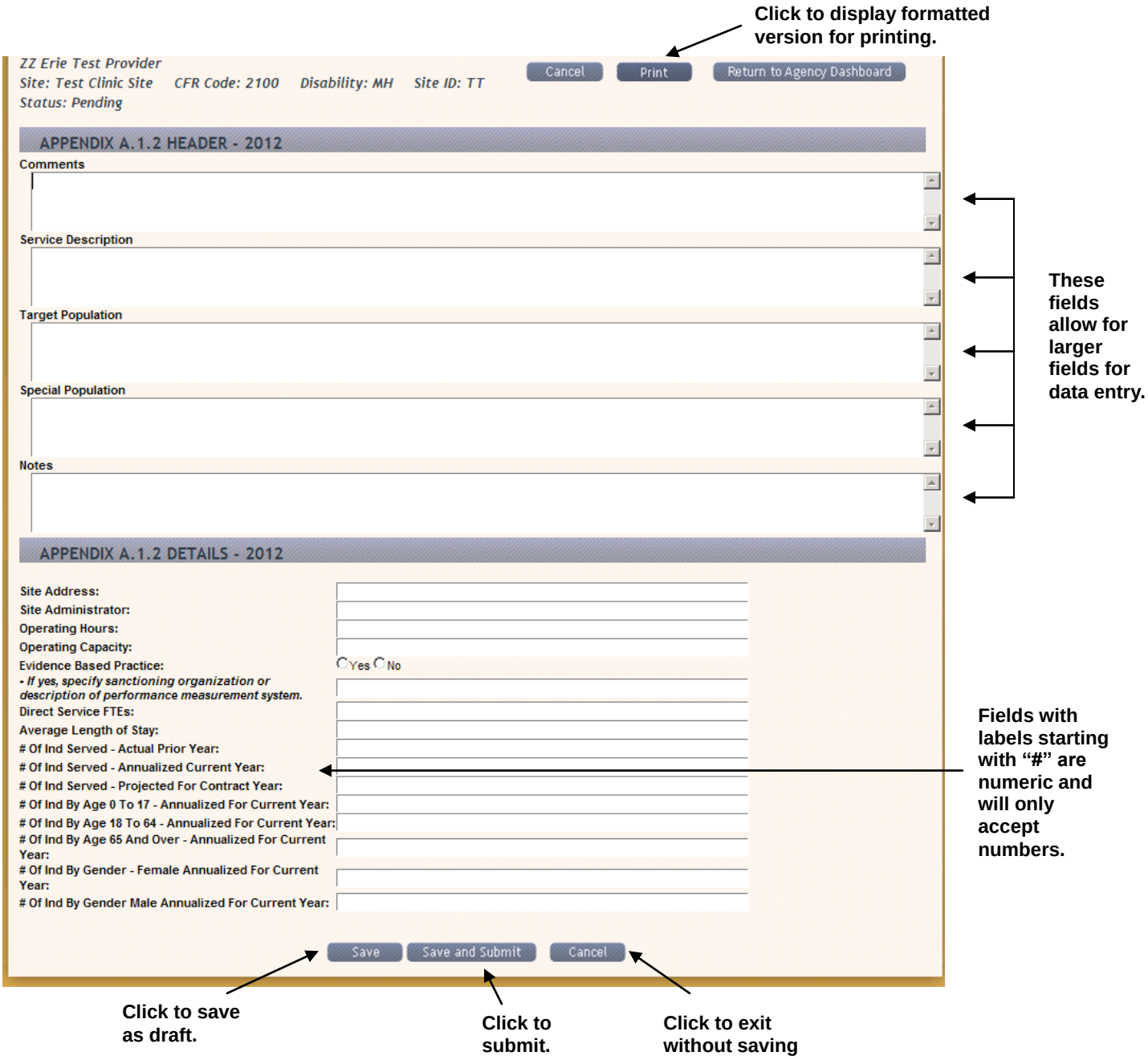
Click here to open an editable view of this form.

3. Enter the requested information into the form.
   Note: Fields with scroll bars allow for larger amounts of data to be entered.

4. When data entry is complete, click **Save** to save your information without submitting it to Erie County Department of Mental Health or click **Save and Submit** to save and submit your information to Erie County Department of Mental Health for review.

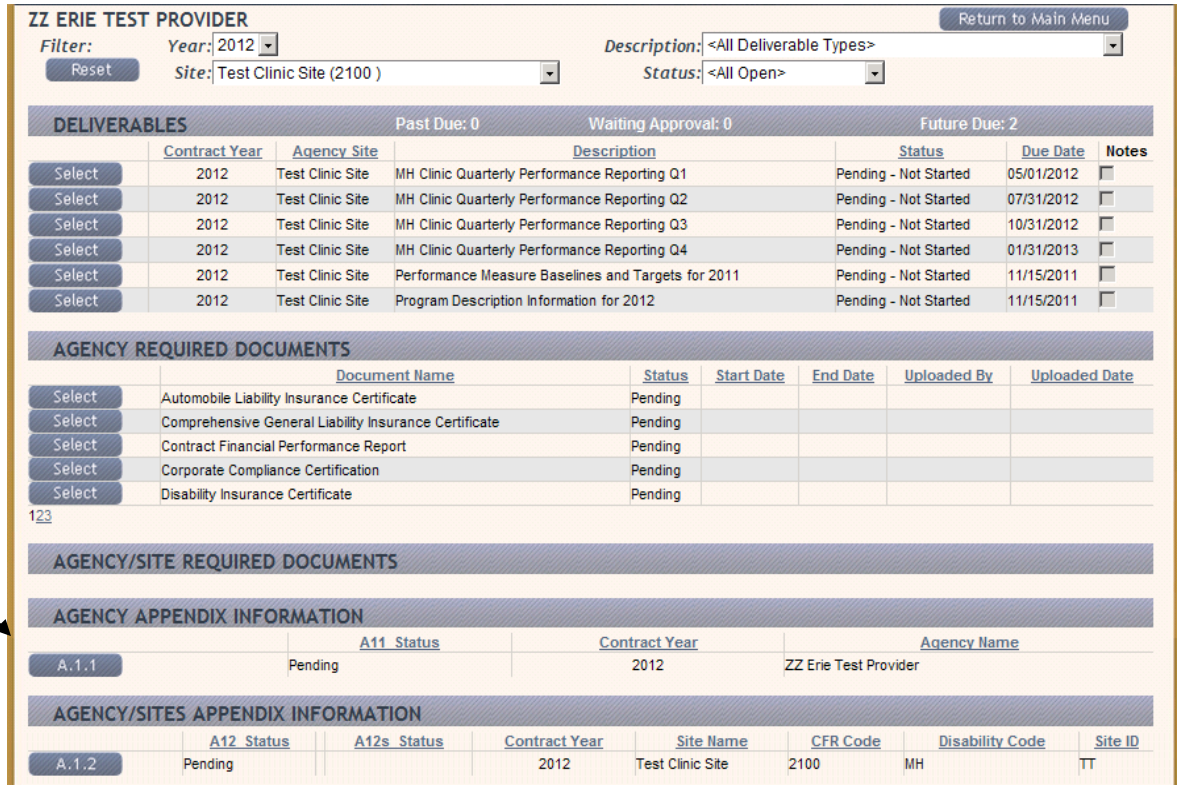
5. As with data collection forms, the status of the Program Description A.1.2 document is always displayed in both the deliverable listing and the Agency/Sites Appendix Information section.

6. A version of the document which displays the full contents of the narrative text fields can be printed by clicking on the **Print** button. The usual Print dialog box will be displayed for the user to select the printer they would like to send the document to for printing.


Click to display formatted version for printing.
ZZ Erie Test Provider
Site: Test Clinic Site CFR Code: 2100 Disability: MH Site ID: TT
Status: Pending
Cancel
Print
Return to Agency Dashboard
APPENDIX A.1.2 HEADER - 2012
Comments
Service Description
Target Population
Special Population
Notes
These fields allow for larger fields for data entry.
APPENDIX A.1.2 DETAILS - 2012
Site Address:
Site Administrator:
Operating Hours:
Operating Capacity:
Evidence Based Practice:
Yes No
• If yes, specify sanctioning organization or description of performance measurement system.
Direct Service FTEs:
Average Length of Stay:
Of Ind Served - Actual Prior Year:
Of Ind Served - Annualized Current Year:
Of Ind Served - Projected For Contract Year:
Of Ind By Age 0 To 17 - Annualized For Current Year:
Of Ind By Age 18 To 64 - Annualized For Current Year:
Of Ind By Age 65 And Over - Annualized For Current Year:
Of Ind By Gender - Female Annualized For Current Year:
Of Ind By Gender Male Annualized For Current Year:
Fields with labels starting with "#" are numeric and will only accept numbers.
Save
Save and Submit
Cancel
Click to save as draft.
Click to submit.
Click to exit without saving

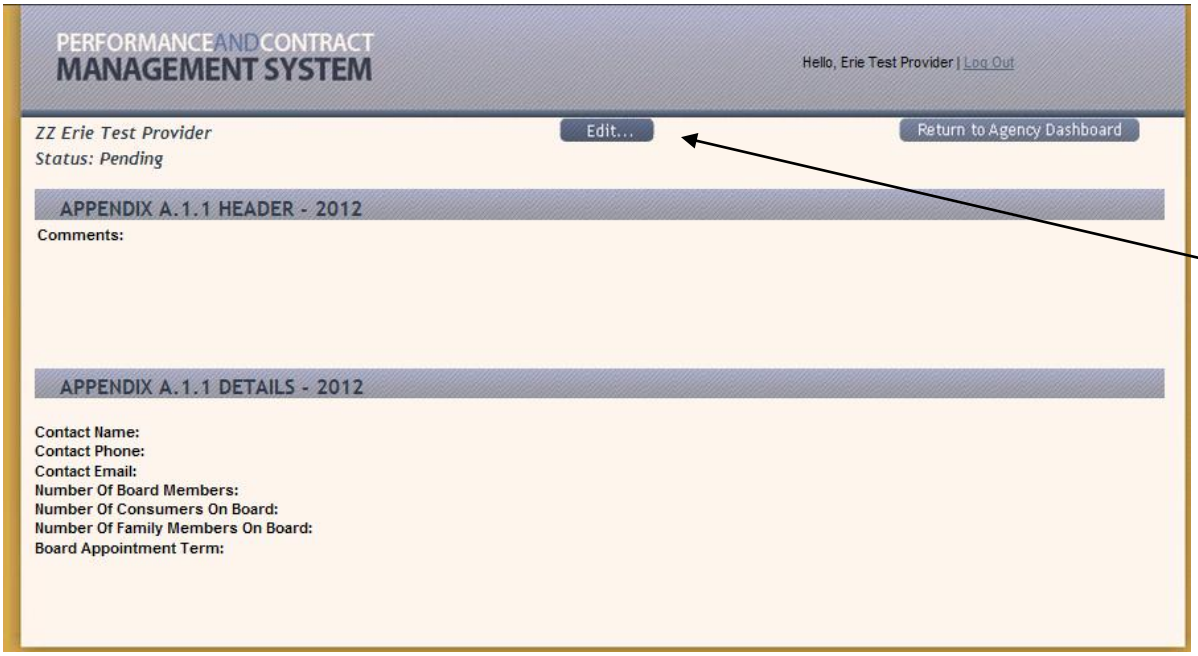
Submitting Data for Agency Information (A.1.1)

1. Click on the **A.1.1** button in the **Agency Appendix Information** section.



Click to open the Agency Information form.

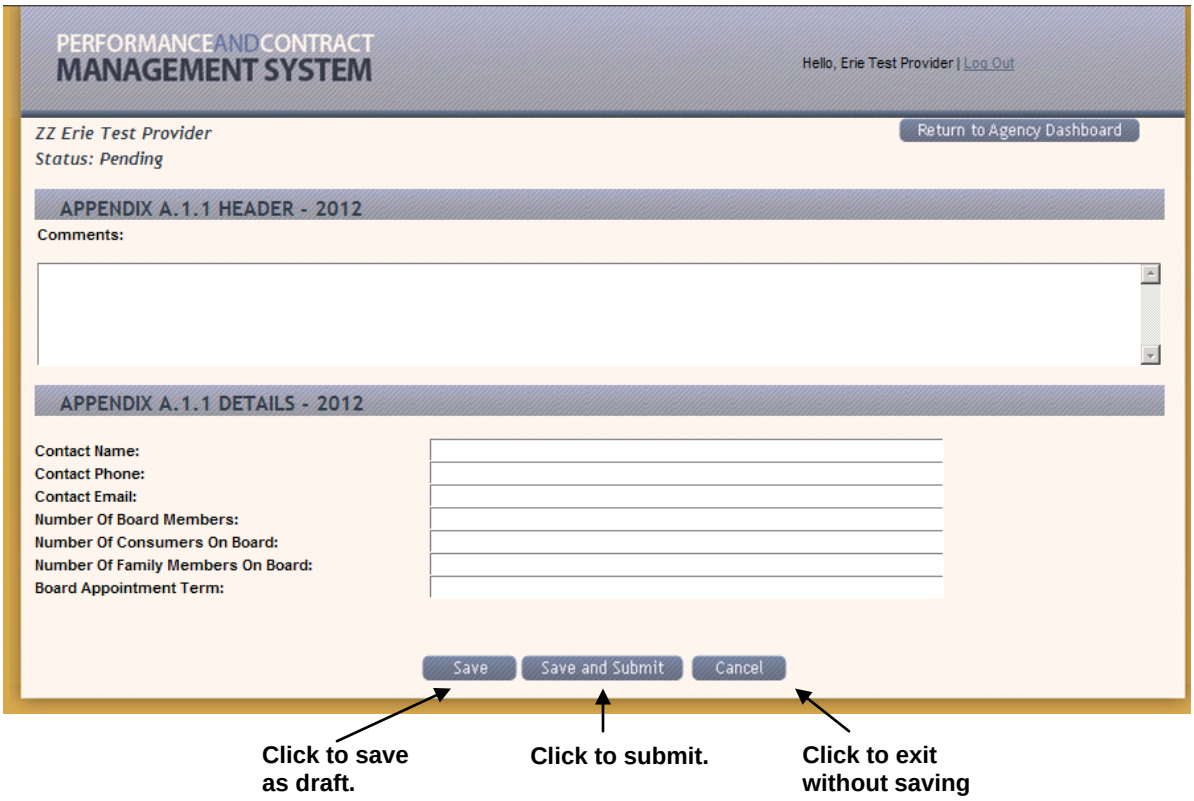
2. When the form is first opened, it will be in "view only" mode. Click on the **Edit** button to access a form that allows you to input and save data



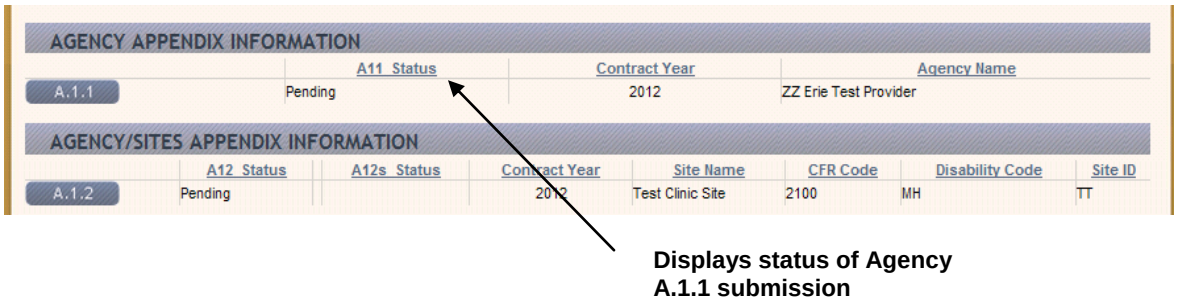
Click here to open an editable view of this form.

3. Enter the requested information into the form.

4. When data entry is complete, click **Save** to save your information without submitting it to Erie County Department of Mental Health or click **Save and Submit** to save and submit your information to Erie County Department of Mental Health for review.

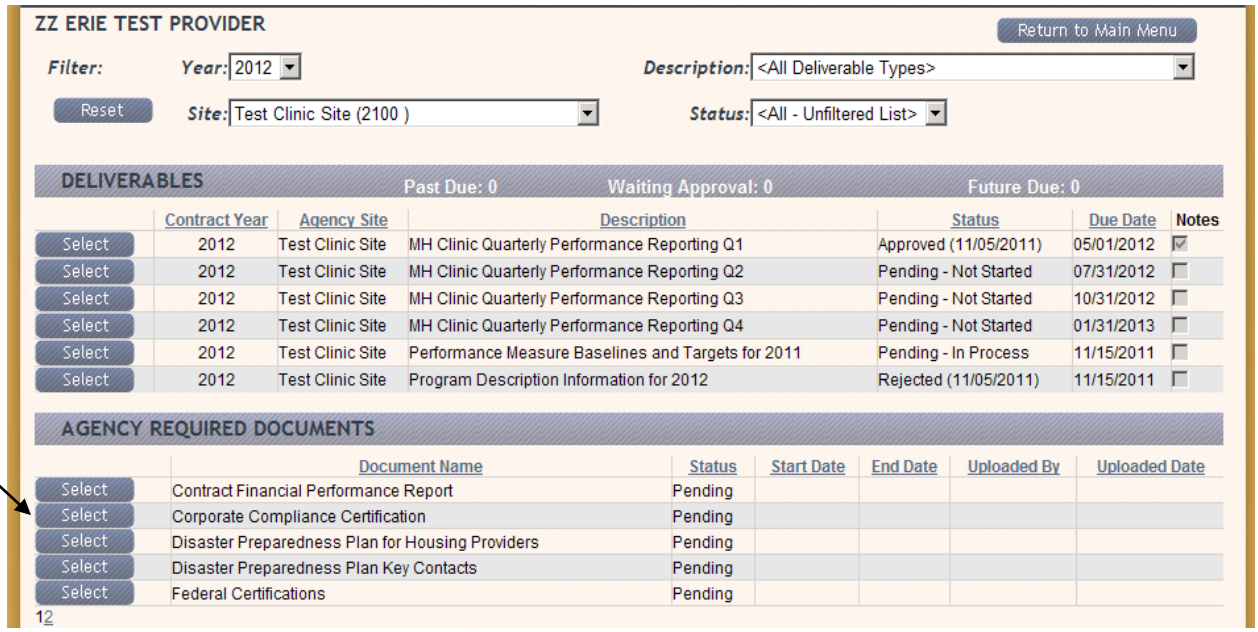


5. The status of the Agency A.1.1 document is always displayed in the Agency Appendix Information section in the column labeled “A.1.1 Status”.



Submitting Agency Required Documents/Uploading Files

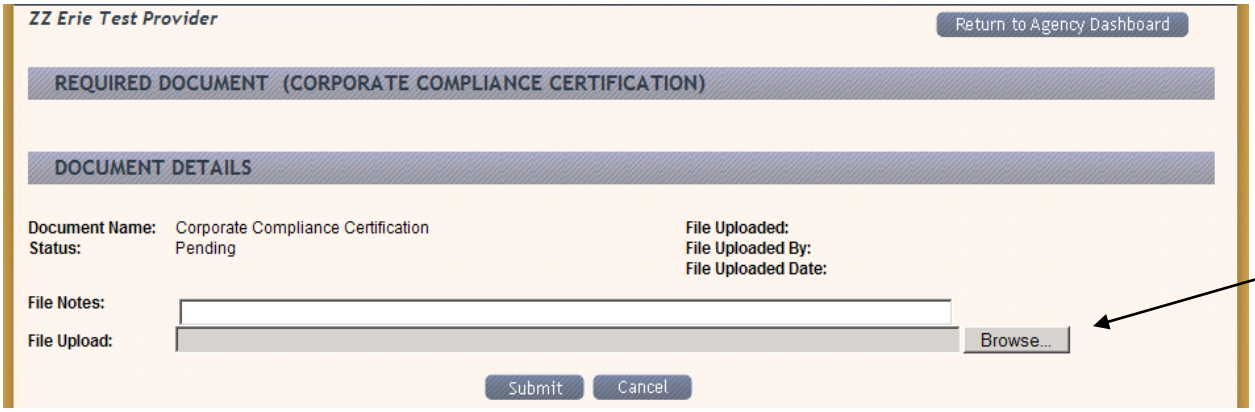
Many of the administrative documents required for execution of the contract are submitted in the **Agency Required Documents** section.



Click to submit a specific document

1. Locate the document in the list and click the "Select" button to begin the submission process.

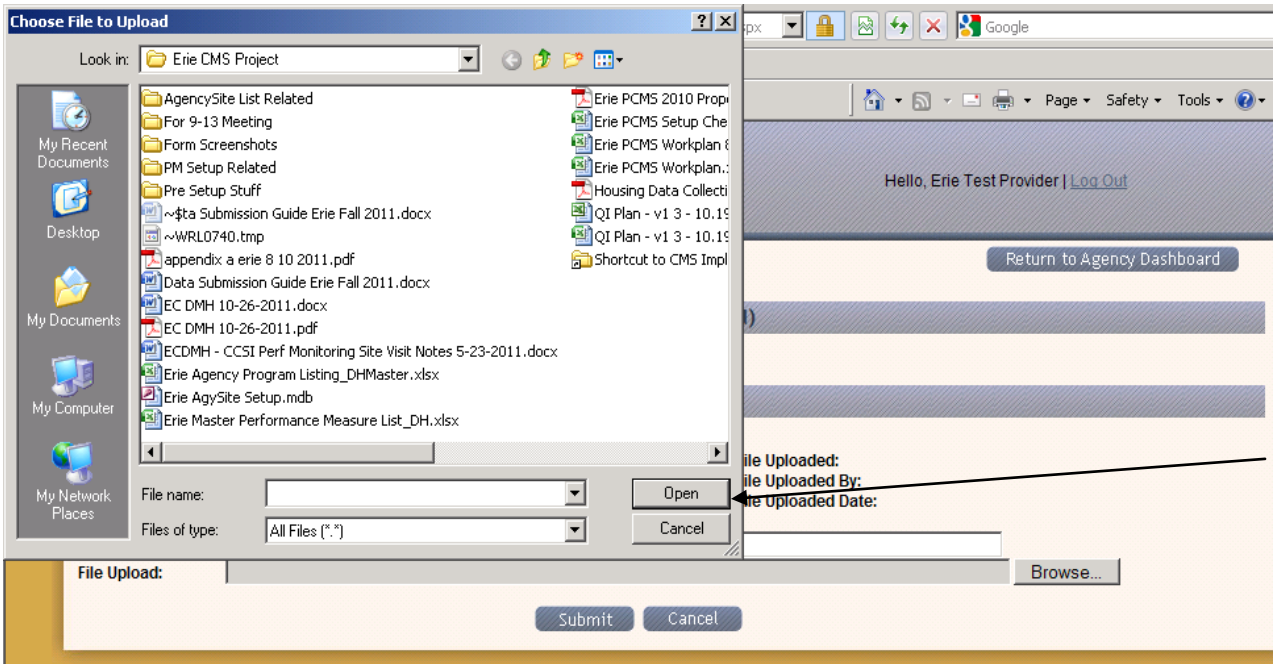
2. Click **Add** button to begin the process to upload a document.



Click to open dialog box to access files on your computer and agency network.

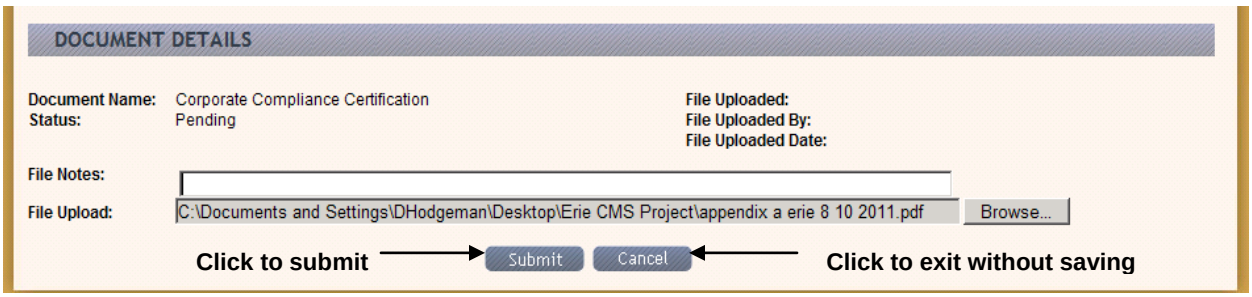
3. Use the **File Notes** field to enter any information you would like about the file you are uploading – this is an optional field. You may enter this information before or after you click on the **Browse** button to locate the file to upload.

4. Use the dialog box that opens to find the file you wish to upload on your computer or network directory. Once you have located it, click on **Open**.

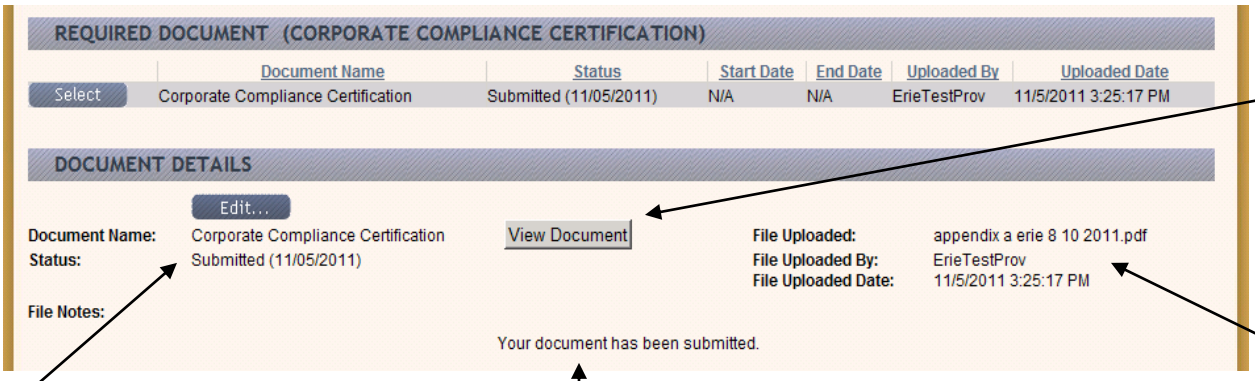


Click once you have selected your file for upload to close the dialog box.

5. The file name will appear in the **File Uploaded** field.



6. Click **Submit** to complete the process. The screen will refresh to display a confirmation that your document has been submitted and populate specific information about the upload event.



Click to view the document that was uploaded

Information about upload including file name, login of user, date/time of upload.

Change of status to "Submitted".

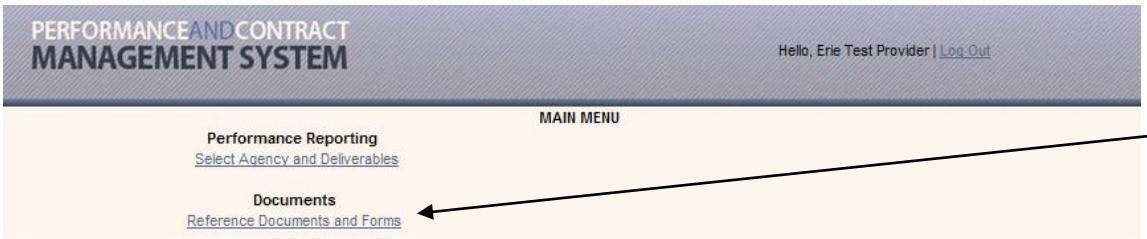
Confirmation message

Note: This same process can be used to upload a file to a data collection form deliverable.

Reference Documents and Forms

The **Documents** section provides a location for resources that all users of the PCMS application can access. It includes general contract information, reference materials and electronic versions of forms that are required for contract execution. Only Erie County Department of Mental Health staff can post documents in this area.

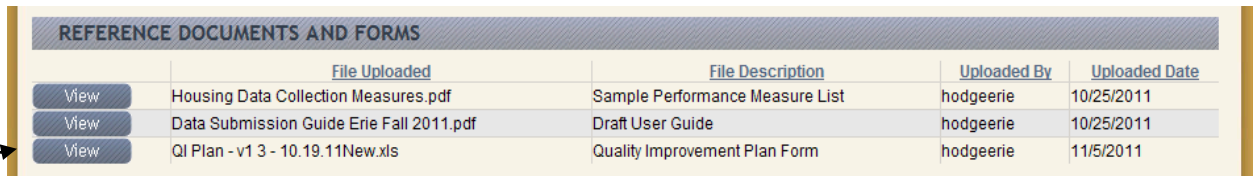
1. Click on **Reference Documents and Forms** to access the available documents.



Click to go to list of documents and forms.

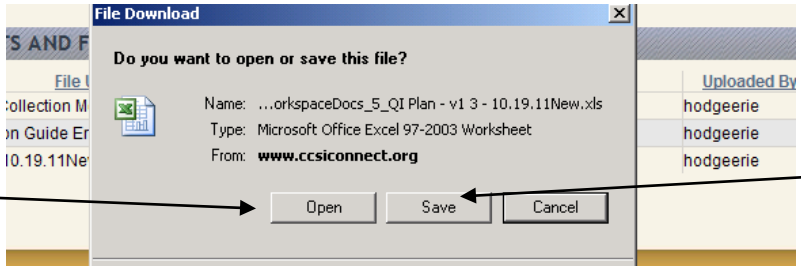
The list of documents will be displayed. Click on the "View" button for the document you wish to view or download.

Click to view or download a document



2. A dialog box will be displayed asking if you would like to open or save the file. To view a document, choose "Open". To download a document to your computer or network directory, choose "Save".

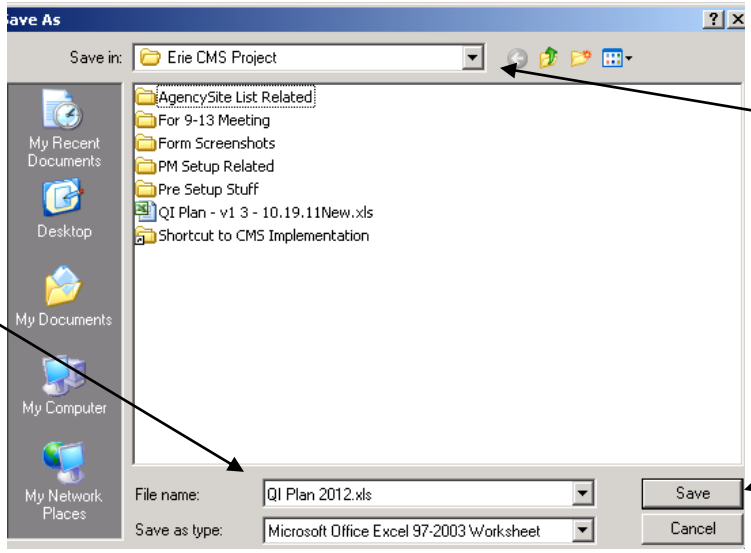
Click to view a document



Click to save a copy of the document

3. If you choose to save a document, a dialog box will be displayed asking for the name and location to save the file.

Use this box to indicate the name you wish to assign to the copy of the file.

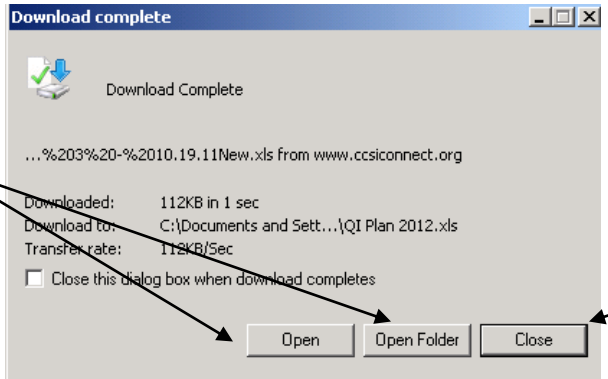


Use the drop down box and other navigation tools to locate the folder on your computer or network to save a copy of the file

Click when you have selected the name and location.

When the file download has completed, a dialog box will be displayed confirming the action and giving you options to open the file or folder.

Click on these buttons to open the file or folder where the copy of the document was downloaded.



Click to remove the dialog box and display the document list.

4. To remove the download dialog box, click on the “Close” button.

Questions or technical problems? Call your Erie County Department of Mental Health disability coordinator.